

Chapter 2

Developing a Pre-Service Training Plan/Package

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*Design is the bridge between **what** the trainer wants to accomplish with (or in) a training event and **how** it should be done.*

--Pfeiffer and Ballew, *Design Skills*

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SCOPE

This chapter includes theory-based but extremely practical information to help you prepare an effective PST session. It provides information on training design as well as worksheets and formats to prepare two major products:

- **An overall PST outline**, including the training schedule and major topics to be included in your pre-service training.
- **A detailed PST plan/package**, the set of materials which will guide both trainers and participants -- members, host site supervisors, and others -- through the PST.

This chapter helps you to review your desired training outcomes and identify the training topics required to reach these outcomes; and then to prepare a detailed training curriculum package -- including a detailed agenda, learning objectives, experiential learning activities (with Trainer's Notes and Member Instructions), and supporting materials. It includes suggestions for how to use and modify sample activities provided in *Section C: Training Topics & Activities*.

IMPORTANCE

Many factors go into making pre-service training effective -- among them the following:

- Training content, including topics and the mix of information, skills, and attitudes to be included.
- The backgrounds, knowledge, skills, and interests of the people being trained.
- The methods and media used to present the content, with emphasis on the extent to which these methods actively engage and involve training participants.
- Facilities and setting.
- Group interaction.
- The knowledge and skills of facilitators and trainers.

This chapter is important because it helps you to identify and consider these factors in developing sound and appropriate pre-service training "packages." It presents training theory and

TARGETED USERS

methods which will be useful not only if you are developing your own PST design, but also if you hire -- and need to monitor -- training design consultants.

The individuals responsible for designing or overseeing the design of PST for AmeriCorps members.

EXPECTED LEARNING

By using this chapter, you should be able to:

- Develop an overall PST training outline.
- Develop a full PST "package" using material included or referenced in this manual and ensuring that the package reflects sound training theory and practice and is appropriate for your AmeriCorps project.
- Prepare or modify specific parts of the PST training package, including an agenda, learning objectives, experiential learning activities, and supporting materials.
- Review and critique PST designs and materials developed by others to ensure that they reflect sound theory and practical experience.

RELATED CHAPTERS

This chapter provides the foundation for developing a training outline and design using some of the activities provided in *Section C: Training Topics & Activities*. It is closely related to the other chapters of the Training Design section.

OTHER THINGS YOU SHOULD KNOW

- Make your training package as detailed as possible -- but recognize that you will almost certainly want to make changes during the training, based on actual experience. For example, you may find that additional time is needed for a particular topic, so some other activity must be modified or eliminated. Once you have done several PST sessions, you will probably need to make fewer on-site revisions.
- The more specific and fully developed your training design, the easier it will be to modify on-site. For example, if you know how long a segment of training is supposed to take, you will be able to modify it without disrupting the rest of the agenda.

Hint: Review *Chapter 1: Decision Making about Pre-Service Training*, page 23, before using this chapter, to be sure that basic decisions about your PST have been made.

Use as much or as little of this chapter as you need. If you have not used experiential learning, read the material and review *The Experiential Learning Cycle* chart, page 85, in Part #5, of this chapter. If you have not used cooperative learning, read *An Introduction to Cooperative Learning Techniques for Adults*, page 197, in *Chapter 5: Supporting Materials*. If you feel your PST has not had strong objectives, use the materials on developing objectives to strengthen that aspect of your PST.

- Remember, there is no one "right" way to design or deliver PST. Your training should fit the unique characteristics of your program -- its members, host sites, assignments, location, communities to be served, etc. Every project and every group is different.

LESSONS LEARNED: ACTIVE LEARNING

Current programs report that one of the most important aspects of training design is ensuring that learning is active and experiential, minimally dependent upon long lectures and one-way presentations. During their first pre-service training, some programs depended heavily upon lectures and panel discussions in which members were passive listeners. They found that retention of information was low and members were frustrated with the process.

LESSONS LEARNED: EXPERIENTIAL ONE-ON-ONE TRAINING

Experiential learning can be used to train individuals as well as groups. Some AmeriCorps programs use one-on-one training for teaching specific technical skills. For example, one police-based program provides assistance to crime victims. A person experienced in victim assistance trains the new member who is assigned to the same police precinct. The program has worked to standardize the training provided, and to ensure that interactive methods are used. For example, the new member and the experienced person role play telephone calls to a crime victim, using several typical scenarios.

Experiential one-on-one training can also involve community assignments (such as identifying resources or assessing needs), problem-solving scenarios ("What should you do if...?"), and other interactive techniques.

People learn information and skills far better through experiential activities than through passive listening; this applies even if the group consists of one member and the trainer/facilitator.

PART #4: DEVELOPING A PST OUTLINE

WHO SHOULD PARTICIPATE:

Key members of the design team -- especially those who will help deliver the training and individuals with in-depth knowledge of various aspects of your AmeriCorps program. A small working group is most practical, with the larger design team providing both initial input and review of the draft outline.

TIME REQUIRED:

Requires one or several meetings. Individuals can take responsibility for particular activities, and then share their work with the larger group. One recommended approach -- if your PST design team includes more than three or four people -- is to use three separate meetings:

- One with the entire PST design team to obtain broad input.
- One with the small working group to develop the draft outline.
- Another full design team meeting to critique and refine the outline.

If member needs and host site concerns have not been determined during the decision-making period, allow time to obtain their input through meetings, focus groups, and/or telephone interviews.

MATERIALS NEEDED:

List of desired training outcomes and needs assessment information
Easel pad, newsprint, markers, and masking tape

OBJECTIVE:

To prepare an overall outline for the PST using a standard format. The outline will specify desired PST learning outcomes and will specify PST topics and major "units" for each segment of each training day, indicating the approximate amount of time allocated to each topic.

DIRECTIONS:

1. Review your basic PST decisions to be clear on the training responsibilities of each segment of the PST -- especially what parts of the PST, if any, are to be centralized and what parts decentralized and the duration, location, and basic structure of the centralized PST.

Hint: Don't forget the importance of involving host site supervisors in the design, delivery, and evaluation of your PST. You should have involved them in your basic decision making (see *Chapter 1: Decision Making about Pre-Service Training*, page 23); now you need to build in meaningful roles such as responsibility for technical skills training, help with community projects, and work with members on their individual objectives. Consider their time commitments and make the best possible use of available time.

2. If you did not use *Decision Worksheet A: Desired PST Outcomes* (page 45) in Chapter 1, use it now or agree on a list of desired member, staff, and other outcomes for the PST. Prioritize the desired outcomes so that you know the three to five most important ones. If you are designing only the centralized PST, focus on topics to be covered in the centralized training.
3. If members of the design team have limited experience with training design, review with them the supporting materials in this chapter.
4. Now follow the *Steps for Developing a PST Outline* on the next page.

DEFINITIONS

For purposes of this manual:

A pre-service training session is one complete PST program as implemented.

A training topic is a content area for AmeriCorps pre-service training.

A training unit is a segment of training in which the activities are closely related in terms of content and objectives and which is presented at one or more specified points in the training schedule.

Steps for Developing a PST Outline

1. **Review your prioritized list of desired PST outcomes.** If you have not developed a list of desired outcomes, agree on these major outcomes now. (See *Decision Worksheet A: Desired PST Outcomes*, page 45, in Chapter 1 of the Training Design section for a sample list of possible outcomes which you may want to use as a starting point.)
2. **Consider the desired balance among different types of PST content, and identify any types of content which will be fully or partially covered at an intermediary or host site level, rather than through centralized PST.** For example, specific knowledge and skills needed for particular assignments may be taught through training at a regional or host site level rather than at centralized training. You will want centralized training to prepare members for the decentralized sessions, but not duplicate their content. Thus, if your members will be involved primarily in parent education activities, you may want to provide specific training on parent education at a decentralized level, but provide training on how to work with community residents and in diversity training as part of the centralized PST.

Consider the following types of PST content:

- Orientation to AmeriCorps, administrative information;
 - Affiliation with the AmeriCorps National Service Network and Teambuilding;
 - General or cross-cutting knowledge and skills needed by all members;
 - Specific technical knowledge and skills needed for particular assignments; and
 - Other (specify).
3. **Identify the training topics or activities that need to be included to reach the desired outcomes and provide the desired balance among various types of content.** Attached are Chart A, a suggested format designed to help you to identify necessary training topics (or activities which are part of some other topic) for each type of desired outcome, and Chart B, a partially completed sample chart showing how it can be used. For additional ideas, see the Training Topics & Activities section (page 233), which covers many of the general topics you will cover.
 4. **Identify training topics which appear in your chart several times; some or all of these may become the integrating themes for your PST.** For example, some integrating themes from Chart B, the sample chart, are:

- Diversity/multicultural awareness, appreciation, and skills;
 - Group activities involving experiential learning for skill development and teambuilding; and
 - Community projects and other opportunities to practice skills and relate "classroom" learning to "real world" situations.
5. **Ensure member input to the training outline.** While some member input can be obtained on the first day of the PST, it is extremely helpful to obtain input earlier in the design stage. This can be accomplished in several ways; for example:
- **Have one or more members serve on the PST design team;** if you haven't yet selected members or are a first-year program and want an "experienced" member, contact the AmeriCorps Leaders Program or AmeriCorps Alums, Inc. (see box on page 30).
 - **Ask all newly selected members to prepare a needs and skills assessment,** and obtain it in time for use in PST design -- members can assess what they feel they need to know and would like to learn, and what they already know and can share with other members (see the sample *Member Training Needs and Skills Assessment*, page 165, in *Chapter 5: Supporting Materials*).
 - **Hold a "focus group" of members** to obtain their perspectives on PST needs or to react to a draft PST plan/package.
6. **Seek advice from nearby AmeriCorps programs which have been operating for a year or more.** You may want to:
- **Talk to the person who coordinated that program's PST,** and ask for important lessons to help with your design; you may find someone who can serve as an ongoing advisor or mentor for your program.
 - **Obtain their members' insights on PST based on a year of service,** and perhaps identify a member or former member to serve on your design team.
7. **Ensure host site input to the training outline.** This can be accomplished in several ways; for example:
- **Include one or more host site managers or supervisors on the PST design team.**
 - **Ask host sites to serve as training partners responsible for certain topics within the PST** such as training for member assignments, understanding organizational culture, and/or community needs assessments.

- **Provide the draft outline to all host sites or to selected sites for review and suggestions.**

8. Build all the information obtained from various sources into an overall PST outline.

This will require deciding on the approximate amount of time required for each topic and determining a logical order for covering them in the PST outline. A *Sample Format for a PST Outline* is attached (Chart C), and three *Sample Training Outlines* (page 171) are in *Chapter 5: Supporting Materials* -- a three-and-one-half-day orientation outline, a one-week PST outline, and a two-week PST outline. In preparing the draft outline, be careful to:

- Use initial sessions to focus on expectations, objectives, and norms and to begin teambuilding.
- Begin with basic skills and build to more difficult ones.
- Recognize logical progressions in topics and skills.
- Mix sessions which focus on knowledge, skills, and attitudes.
- Follow a topic that is likely to be very intense with something lighter.
- Consider the availability of community presenters and host site supervisors and schedule them at times which minimize hours away from their agencies.
- Try to allow some free time, especially in the evenings, in addition to planned activities which enable members to interact informally.
- Use a consistent schedule of starting and ending times, breaks, and lunch periods except during community activities, to minimize confusion and provide some predictable structure.
- Build in time for evaluation and reflection.

Preparing Each Component of a Pre-Service Training Package, page 93, in Part #5 of this chapter provides additional guidance in developing a training schedule.

Chart A: Outcomes and Training Topics

Desired Outcome	Training Topics/Activities	To be Included in Centralized or Decentralized PST

Chart B: Sample Outcomes and Training Topics

Desired Outcome	Training Topics or Activities	To be Included in Centralized or Decentralized PST
Member Affiliation with the AmeriCorps National Service Network and Teambuilding:		
Members will feel a strong sense of affiliation with the National Service Network and with this AmeriCorps program.	History/background on national service and AmeriCorps History/background on your agency and its AmeriCorps program Affiliation-building experiences and group activities Graduation/appreciation activities	Centralized Centralized Centralized Centralized
Members will have developed a strong sense of teamwork with the other members who will be working in the same host site, same geographic area, and same program priority area.	History/background on projects to which members will be assigned and the agencies which run them Teambuilding experiences and group activities Appreciation of diversity/multiculturalism Graduation/appreciation activities	Decentralized Centralized Centralized Centralized
Members will have developed and be able to demonstrate basic communication skills.	Communicating content, communicating feelings Listening skills Giving feedback and critiquing others Other communication skills development	Centralized Centralized Centralized Decentralized
Members will have learned and be able to demonstrate CPR and First Aid skills.	How to provide CPR and basic first aid	Part Centralized, Part Decentralized
Members will have learned basic concepts and applications of conflict resolution techniques and be able to describe ways to apply them in their AmeriCorps assignments.	Introduction to conflict resolution Negotiation skills Other forms and applications of conflict resolution techniques	Centralized Centralized Decentralized

Desired Outcome	Training Topics or Activities	To be Included in Centralized or Decentralized PST
Orientation to AmeriCorps and Administrative Information:		
Members will know and understand basic administrative and program requirements of AmeriCorps, as stated by the Corporation for National Service.	AmeriCorps purposes, priorities, and regulations	Centralized Centralized
Members will be able to read, use, and understand AmeriCorps forms and reports.	Administrative forms and procedures -- understanding and using them	Decentralized
Members will have gained initial exposure or basic skills in certain affiliation-building activities which are encouraged and reinforce the ethic of service	Communication, Conflict Resolution, CPR/First Aid Environmental Audit Citizenship HIV/AIDS Education	Both Decentralized
General or Cross-Cutting Knowledge and Skills:		
Members will be prepared to work in diverse member groups and with diverse organizations and communities.	Multicultural/diversity awareness, knowledge, appreciation; cultural competence skills Experience in working with diverse member groups or teams Practice working in diverse communities	Centralized Both Both
Members will have developed skills in working effectively in groups -- planning, problem solving, running meetings, negotiation and conflict management, and related skills.	Knowledge and skills in working effectively in groups, including: Understanding of group process Running effective meetings; Group planning and problem solving Negotiation and conflict resolution Practice in applying group processes through a community project, community survey or needs assessment Communication skills -- speaking, listening, feedback Use of many different group activities Teambuilding activities	Centralized Centralized Centralized Centralized

Desired Outcome	Training Topics or Activities	To be Included in Centralized or Decentralized PST
Members will understand their own leadership styles and those of other people, concepts of situational leadership, and their implications for the AmeriCorps experience.	Leadership styles and situational leadership Group activities enabling members to experience different leadership and group problem-solving roles in practical situations	Centralized Centralized
Members will have the skills needed to help conduct community needs assessments, establish and maintain positive relations with community members, and encourage community involvement in projects.	Determining community needs and resources (surveys, needs assessments, focus groups) Community relations skills Community involvement Role plays or other practice with host site supervisors, members On-site practice -- community survey, community needs assessment, community project	Centralized Centralized Centralized Decentralized Centralized
Members will have had practical experience in planning and implementing at least community project.	Planning and completion of one or more community projects -- in the community where the member will be located or in another community near the PST	Both
Members will have the office and professional preparation to function successfully within the organizations to which they are assigned.	How to work effectively within an existing organization -- fitting into "organizational culture" -- e.g., promptness, dress codes, other expected skills and behaviors	Decentralized
Members will be prepared to keep portfolios or otherwise reflect upon and evaluate their AmeriCorps experiences.	Introduction to keeping portfolios Interim and end-of-PST evaluation Time to maintain/update portfolios	Centralized Both Both
Project-Specific Knowledge and Skills (Optional):		
Members will have developed specific objectives and project plans for their own AmeriCorps assignments.	Project planning and objectives setting Joint planning with site supervisor, members with same assignment	Centralized Decentralized

Desired Outcome	Training Topics or Activities	To be Included in Centralized or Decentralized PST
Members will have the programmatic and technical knowledge and skills needed to carry out their individual assignments successfully.	Knowledge, skills, attitudes related to specific assignments Multicultural/diversity awareness/skills If feasible, community survey or other activity located at the host site, to develop familiarity with the site and assignment	Decentralized Centralized Decentralized
Members will have completed targeted needs assessments for their community or project.	Community survey or needs assessment	Decentralized
Site supervisors and members will have jointly developed objectives and project plans for each member or crew.	Joint planning and objectives setting by members and host supervisors for specific member projects/assignments	Decentralized
Site supervisors will feel a sense of group affiliation with the National Service Network and with this AmeriCorps program.	Teambuilding activities involving members and host site supervisors Community projects or other group activities involving members and host site supervisors	Centralized Decentralized

Chart C: Sample Format for a PST Training Outline

Date/Day	Morning Time/Topic/Activity	Afternoon Time/Topic/Activity	Evening Time/Topic/Activity

PART #5: DEVELOPING A DETAILED PST PLAN/PACKAGE

WHO SHOULD PARTICIPATE:

The individuals responsible for developing the detailed PST plan or "package" -- schedule, topics, training objectives, experiential learning activities, supporting materials, trainer instructions, evaluation strategies, etc. This may be any (or several) of the following: program training staff, collaborating agency or host site training staff, individual members of a PST design team who are each taking responsibility for one or several training topics or units, or consultants.

Hint: It is difficult for a trainer to use agendas and materials developed by other people. If your training will be delivered by consultant trainers, involve them from the beginning in training design -- or expect them to modify the training to fit their own styles and priorities. If you want specific content included or are committed to particular training styles or types of exercises, provide this information to potential trainers before hiring them. For example, share your PST Outline (see page 171 for examples), *Outcomes and Training Topics* chart (page 75), and formats to be used such as Trainer's Notes and Member Instructions (see the Training Topics & Activities section for samples).

TIME REQUIRED:

Ideally, several weeks or a month to be spent in reviewing the agenda, agreeing on types of experiential learning to be used, developing individual units of training, putting them together and modifying the agenda or units to fit together effectively, review and revise the entire plan, and prepare for a mock training session to test them (see *Chapter 3: Preparing Trainers*, page 107). Time required will depend upon the length and scope of the PST, the size and experience of the PST design team, and the amount of concentrated time these individuals have available to focus on training design.

MATERIALS NEEDED:

Draft PST outline

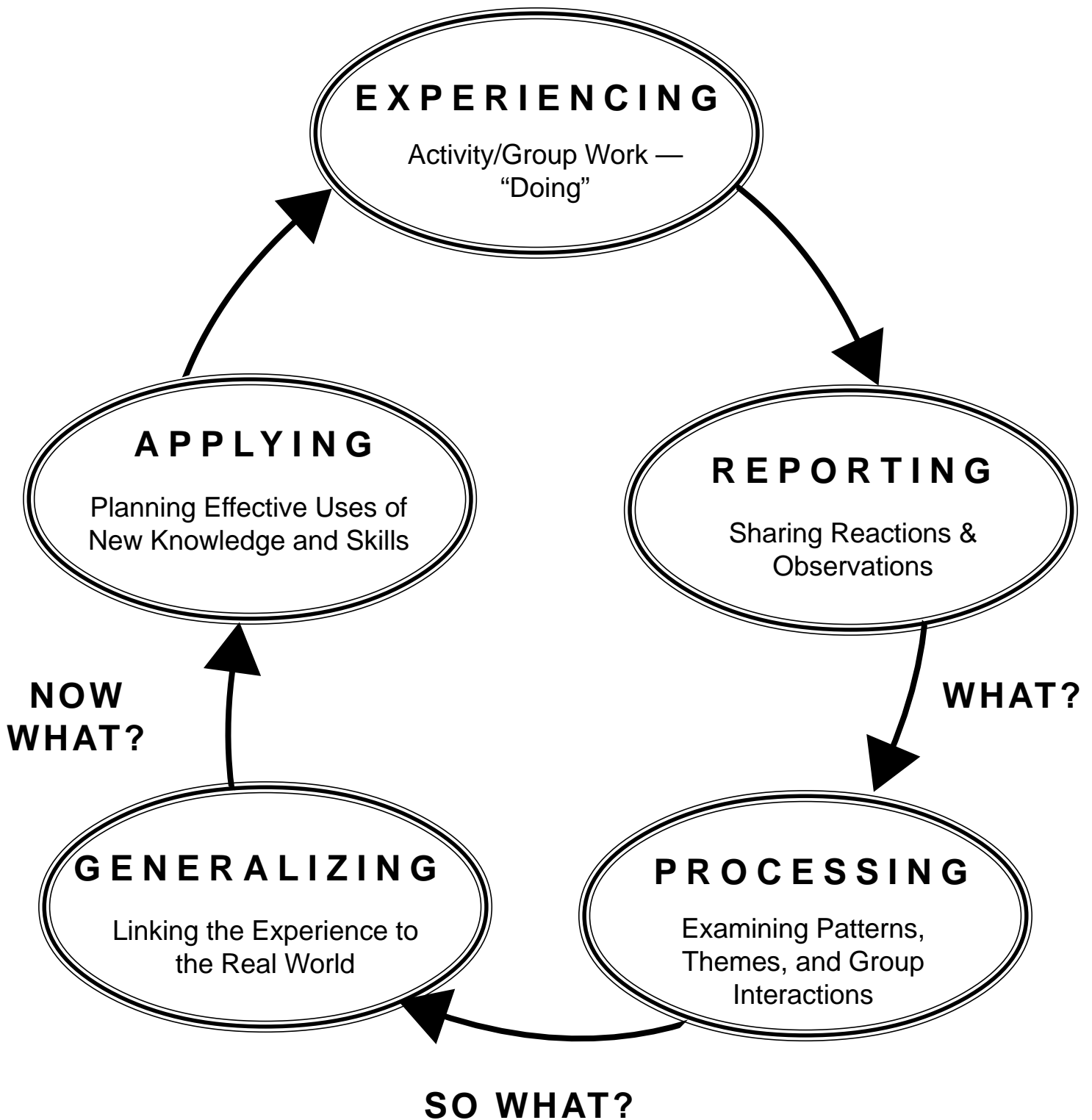
OBJECTIVE:

To develop a full PST plan or package, including training objectives, experiential activities, community experiences, trainer instructions, and reference materials -- ready for use in a mock training session and eventually in your PST.

DIRECTIONS:

1. **Be sure you have a draft PST outline prepared and approved by your training decision makers.** Assuming that you have completed Part #4 of this chapter, you have developed an overall PST outline specifying desired outcomes, training topics or units to be covered, and the order in which these units will be presented. You have also determined what part of the training will involve host site supervisors or other individuals other than the AmeriCorps members.
2. **Use *Sixteen Steps for Developing a PST Plan/Package*, page 87, to guide development of the detailed training package.**
3. **Be sure you are familiar with the experiential learning cycle and the closely related service-learning and adult learning models.** The boxes on pages 85-86 show the cycle and describe its major components and its similarity to the service-learning (page 191) and adult learning models (page 193).
4. **Look for ideas for covering a topic and for suggested activities and handouts in the Training Topics & Activities section** of this manual, which provides activity "recipes" complete with Trainer's Notes, Member Instructions, case studies or other handouts, and supporting information.
5. **Use as many or as few of the forms and supplemental materials as needed.** They include worksheets as well as information on how to design experiential training for adults and how to refine training activities to meet your PST needs, as well as how to hire and supervise a training design consultant (see *Chapter 5: Supporting Materials*, page 151) and the activities in the Training Topics & Activities section.

The Experiential Learning Cycle



EXPERIENTIAL LEARNING

This entire manual is based upon experiential adult learning -- it assumes that all learning should be active, that we learn best by doing. In experiential learning, members gain knowledge and understanding, explore their own attitudes, see skills in action, learn from each other, and validate their own learning through structured experiences. There are a number of different experiential learning models. One of these models is described below and illustrated on the previous page. This experiential learning model includes five inductive learning stages:

- **Experiencing:** Participating in some activity, alone or in a group, which is designed to produce information or understanding -- to identify, explore, examine, or study a problem, topic, or issue and generate a common base of information or data for the steps which follow. Experiencing can lead to a sense of discovery. This manual suggests a wide range of structured learning experiences, which can be individual, small-group, or full-group based.
- **Reporting:** Sharing the experience, reporting reactions and observations in the data-processing stage of learning. The facilitator or trainer plays an important role in structuring the reporting stage; members discuss "What happened?" or "How did it go?" Often, different members or groups will report very different thoughts or feelings about the experience.
- **Processing:** Systematically examining and analyzing the shared experience, looking for patterns, themes, relationships, and group interactions. Members are most likely to learn from the experience if they consider "What kinds of things happened and why?" The trainer's role is to help members to fully discuss the experience through such approaches as reports from observers, identification of recurring themes or topics, and full-group discussion around specific questions.
- **Generalizing:** Linking or extrapolating the experience to the real world, by identifying useful concepts or approaches. Generalizing answers the question "So what?" The facilitator should help members to make inferences, and present additional theoretical information or research data where appropriate.
- **Applying:** Using the generalized concepts, information, and skills in real-life situations. This can be done through planning and discussing how to apply what was learned, role-playing its use, or actually putting it to use through community activities. Giving members the opportunity not only to use the learning but to share with and teach others further enhances learning retention.

These stages may overlap and need not always occur in such clear and discrete steps, but all are important in maximizing retention. The adult learning cycle is very similar to the experiential model, except that it excludes reporting. This additional step is particularly important when your structured activities are small-group rather than individual-learning based, and different groups experience the activity in different ways. Each group may be given a slightly different assignment so its members have a somewhat different experience. Reporting enables the entire group to share these varied experiences.

The cycle of service-learning uses a type of experiential learning as a base. In experiential learning, the experience is often a role play or case study that takes place in the training or classroom; in service-learning, the experience is always a real world experience through a community service project. Therefore, service-learning must add two stages preceding the experiencing stage in the experiential learning cycle: 1) identifying the community service project based on identified community needs and 2) planning and preparation for the project.

Sixteen Steps for Developing a PST Plan/Package

1. **Be sure that the PST package meets AmeriCorps guidelines.** The Corporation for National Service provides only a limited number of training requirements, and some need not be met during PST. Member training guidelines related to PST are identified in the shaded boxes throughout the manual. Consult your grant documents and new materials from CNS to identify updated guidelines or recommendations.
2. **Establish a clear workplan and timeline for completing your PST package.** You may already have prepared one as part of your decision making (see *Sample PST Workplan and Format*, page 59, in *Chapter 1: Decision Making about Pre-Service Training*). Ideally, you will want your detailed training plan ready a month before the actual PST, in time for review, redrafting as needed, use in a mock training session (see the following chapter), final revision, and copying of trainer and member notebooks.
3. **Be sure one individual is responsible for coordinating the design process, but divide responsibility for preparing specific training units.** One person needs to make sure that materials are prepared on time, and integrated into a unified PST package. That person should also serve as a resource to the design team, prepared to answer questions, help make resource materials available, and provide an early review of draft materials. However, responsibility for drafting detailed training materials may given to one or two individuals -- specific program, collaborating agency, or host agency staff, or consultants - or responsibility may be divided among a number of different PST design team members. For example:
 - Host site personnel might take responsibility for topics related to community surveys or community projects.
 - Collaborating partners might handle project-specific or priority area-focused topics.
 - AmeriCorps program staff might handle topics related to AmeriCorps requirements and administrative matters.
 - Other topics might be assigned based on experience and interest.
4. **If you are going to use training consultants, involve them early, select them carefully, and monitor them well.** If you are going to use consultants to help design --

Hint: If some individuals have lots of "content" knowledge but limited training design experience, consider "teaming" them with people with training design experience.

or to take primary responsibility for designing -- your PST package, define their role carefully, consider a group discussion as well as an individual interview, see what kind of training they have done before and whether they are familiar with AmeriCorps, and ask questions which will help you determine whether their training philosophy and approach fit your needs (For more information, see *Hints for Hiring and Using a Training Consultant*, page 185, in Chapter 5).

5. **Provide standardized formats for training units and materials.** Be sure that everyone provides learning objectives, activities, trainer instructions, member instructions, and handouts, and suggests ways to evaluate learning. (See any chapter of the Training Topics & Activities section of this manual for a sample format used throughout this manual.) Remember, even though you may make significant modifications in the materials based on actual PST events, it is easier to change a design which is clear and specific than one which is vague and incomplete. Also, if several different trainers and facilitators will be involved -- and especially if you haven't worked with them before -- be sure your materials make clear not only the content to be presented, but how you want it presented.

6. **Ensure that training activities emphasize experiential learning.** Studies have shown that to retain information or develop skills requires active learning -- the chance to use information and to practice and apply skills -- rather than passive listening. The more active the learning process, the greater the retention of knowledge or skills. Almost anything can be taught using experiential methods; cooperative learning structures are especially practical for PST (see the boxes on experiential learning, page 85, and *Preparing Each Component of a PST Package*, page 93, in this chapter and *An Introduction to Cooperative Learning Techniques for Adults*, page 197, in Chapter 5: *Supporting Material*).

WHY EXPERIENTIAL LEARNING OPPORTUNITIES ARE IMPORTANT: THE LEARNING PYRAMID

According to the National Training Laboratory,
research shows the following average retention rates
for different teaching or training methods:

- 5% Lecture**
- 10% Reading**
- 20% Audio-Visual**
- 30% Demonstration**
- 50% Discussion Group**
- 75% Practice by Doing**
- 90% Teaching Others**

7. **Identify existing training materials and modify them to fit your program.** This manual provides a variety of sample topics and activities, complete with trainer notes, member instructions, and supporting information. Some can be used "as is," but most case studies and worksheets will benefit from being "localized" and "tailored" to fit your program and your member group. Instructions for modifying materials are provided in *Preparing Each Component of a PST Package*, page 93, in this chapter; the Training Topics & Activities section introduction, page 233, provides additional ideas for modifying specific activities to meet your unique needs.

LESSONS LEARNED: PROVIDING EXPERIENTIAL LEARNING

Many programs have said that in their first PST, they presented AmeriCorps regulations and administrative requirements through lectures, which did not keep members interested or involved. They have asked for ways to present this information in a more active and interesting way -- to supplement or replace lectures.

Almost anything can be taught using experiential learning methods. Cooperative learning groups offer a variety of active structures for experiential learning.

If you use cooperative learning groups, you can assign each group responsibility for learning about and then teaching other members about one aspect of AmeriCorps requirements and administrative information. One group might be responsible for teaching the members about prohibited activities, another might explain how to read stipend and leave statements. Ask each group to develop and deliver training using case studies and other active approaches. The groups will take responsibility for first understanding the topic and then teaching others. The process will contribute to teambuilding, and program personnel will serve as facilitators for the cooperative learning groups rather than as lecturers.

8. **Be sure that integrating themes become a major part of your PST package.** You should already have identified some integrating themes while developing your outline; be sure they are built into experiential activities and lecturettes. It may be helpful to identify these themes and provide a list of them to everyone on the PST design team, to encourage their integration into the PST plan. For example, if one theme is diversity -- developing an appreciation for diversity and skills in working with diverse populations -- don't deal with this only through specific training on multiculturalism and diversity. Include case studies involving diverse groups in other activities such as situational leadership, conflict resolution, and group problem solving. Include diversity questions in the community survey. Arrange a community project involving diverse groups.

9. **Design community activities as an integral part of the PST experience.** If training occurs at or near host sites, a community needs assessment or survey can provide a way of applying community-focused skills. In any location, at least one community project is feasible. It will be most beneficial as a training experience if the design requires groups of members to help plan and coordinate the project, as a way of developing their group and community skills and their sense of identity as a team (see *Chapter 14: Community Projects*, page 575, in the Training Topics & Activities section).
10. **Develop training appropriate for individuals with a variety of backgrounds, interests, and learning styles.** Be sure that activities reflect a range of approaches; mix case studies, problem-solving, worksheets, self-assessments, role plays, and other techniques. Remember to involve as many of the senses as possible -- people learn by seeing, hearing, feeling, and talking. Consider the fact that some members probably enjoy competition, while others prefer cooperative approaches. Some like to work individually, and others are most comfortable in teams. Help all members to feel comfortable part of the time and to be challenged to try new approaches. (See *AmeriCorps Members as Adult Learners: Reminders*, page 193, in *Chapter 5: Supporting Materials*.)
11. **Remember the "human clock" when choosing activities and preparing the final detailed training agenda.** Be sure that after-lunch activities are lively to wake people up. Don't show slides or overheads requiring a darkened room early in the morning or late in the afternoon, unless you want to encourage naps. Vary the order of presentation -- sometimes lecturates can follow rather than precede small-group work, for example.
12. **Beware of information overload.** Because bringing members together is expensive and because available time is limited, you may be tempted to use every day and every evening, including weekends. This may seem unavoidable if you have a very short PST, but remember that there are limits to how much people can absorb. If you follow full days with evening sessions, you may discover that retention is limited. You can maximize attention and retention through active, experiential methods, but members need time to rest, to interact informally, and to reflect on the PST experience.
13. **Locate and use existing reference materials.** You don't have to develop everything yourself; ask permission to reprint effective articles and worksheets. Be sure to allow time to obtain permission from the publishers to copy such materials. Often, you will want to prepare your own materials, using ideas or formats developed by others; always give credit for ideas from other sources.
14. **Allow time for "putting it all together."** Once you receive all the pieces of your PST package, spend time integrating them and modifying the outline to create an integrated package that flows logically. Then have the design team get together and

review it all. Send the draft to one or two people who have not been involved in the actual design effort but know about AmeriCorps and/or are expert trainers, and get their input. Be prepared to revise outlines and materials more than once.

**LESSONS LEARNED:
TRAINING SUCCESS FOR LESS EXPERIENCED TRAINERS**

Not only does experiential training increase member involvement, knowledge, and skill retention, it is also far less demanding for trainers than more passive approaches. Developing the activities (or customizing activities in this manual) takes some time and planning, but the actual training develops its own momentum, and everyone -- trainers, members, host site personnel, resource people -- shares responsibility for "making it work."

Less experienced trainers have found experiential approaches, especially cooperative learning with its well-structured small group activities, a sound formula for training success.

15. **Be prepared to train your staff and orient presenters to your PST package.** Your PST plan should include an introductory meeting, mock session, and/or training for them. *Chapter 3: Preparing Trainers*, page 107, focuses on this aspect of training design.
16. **Remember that in AmeriCorps, training is ongoing.** AmeriCorps guidelines allow for up to 20% of the members' service hours to be spent in training, education, or similar approved activities. Be sure to reserve funds and other resources for follow-up coaching and supplemental training throughout the year. Provide additional skill development which builds upon the PST experience. Prepare members to train others, sharing what they have learned. The learning pyramid shows that the highest retention rate -- 90% -- occurs when the learners teach others.

Preparing Each Component of a Pre-Service Training Package*

COMPONENTS OF YOUR PST NOTEBOOK

Your PST training plan/package will probably include both a notebook of materials for members and additional trainer materials. The information which follows is designed to help you use the materials in this manual along with other information from various sources to prepare a detailed pre-service training package -- including the materials you will give to all members and the additional materials needed for your trainers and presenters.

The following components are recommended:

- **A detailed training agenda** for the entire PST
- **For each unit:**
 - ◆ **A unit agenda**
 - ◆ **Learning objectives**
 - ◆ **Activities**, with Trainer's Notes, Member Instructions, and other handouts
 - ◆ **Supporting materials** which can be used as reference materials for trainers (for use in developing lecturettes, prepared newsprint, or overheads) and as handouts for members
 - ◆ **An evaluation strategy**

Chart D: Training Unit Summary, page 105, provides a format for outlining a training unit. Preparation of all components except the evaluation strategy is described below. Information is provided on developing a detailed training agenda, assembling individual training units, developing learning objectives, preparing activities, selecting or preparing supplemental materials, and using the materials in this manual for developing PST units. *Chapter 4: Evaluating Pre-Service Training*, page 131, provides detailed information about PST evaluation and *Chapter 5: Supporting Materials* includes sample evaluation forms, page 225.

* This document draws information from a National Council of La Raza (NCLR) trainer training manual developed by Emily Gantz McKay while on the NCLR staff. Includes major revisions for the AmeriCorps manual.

PREPARING A DETAILED TRAINING AGENDA

Your detailed training agenda summarizes the content and process of your PST. It lists the content of each training unit, indicates the major points to be covered, provides the title and timeframe for each activity, and lists trainers or presenters. This detailed agenda will guide your trainers and presenters, and tell members what to expect from each unit of training.

Development of a detailed training agenda covering the entire PST period may be the first or the last step in PST package design. The training outline described in the first part of this chapter can be the starting point for your detailed agenda. A detailed training agenda can be built deductively from that outline -- adding the details of each training unit -- or inductively -- beginning with specific units and putting them together to form a detailed agenda. There is no set format for a detailed training agenda; the following boxes provide one possible format and a sample of a unit agenda following that format.

SAMPLE FORMAT FOR EACH UNIT OF A DETAILED TRAINING AGENDA

Day/Date

Start time - end time

UNIT NAME

- Trainer/Presenters
- Introductory points
- Content points
- Activity # and Name
- Processing/Discussion
 - ◆ Presentation
 - ◆ Processing questions/points
 - ◆ Generalizing questions/points
 - ◆ Application
- Additional Activity (same format)
- Sum-up
 - ◆ Major points
 - ◆ Questions and answers
- Unit evaluation

SAMPLE DETAILED AGENDA FOR ONE TRAINING UNIT

Monday, October 9

9:00 -
10:30 a.m.

UNDERSTANDING ORGANIZATIONAL CULTURE AND NORMS

- Facilitators:
 - ◆ Juana Fulana, Executive Director, MultiService Center of Megaurban County, Host Site for 15 members
 - ◆ George Huong, AmeriCorps member, 1995-96
- Introduction: What do we mean by "organizational culture" and why should you care?
 - ◆ Sharing of experiences with organizational culture by second-year members
 - ◆ Sharing of experiences of new members
- Small-Group Activity: "What do you do when...?"
 - ◆ Formation of cooperative learning groups
 - ◆ Individual and group work on scenarios (see Member Instructions)
 - ◆ Presentations on scenarios
 - ◆ Processing and generalization
- Identifying key types of norms
 - ◆ Listing based on scenarios
 - ◆ Additional types
 - ◆ Generalization/significance
- Applying what you learned
 - ◆ How to learn the organizational norms of your host organization
 - ◆ Other implications
- Sum-up
- Unit evaluation: discussion and written assessment

10:30 -
10:45 a.m.

BREAK

Build a member-focused training agenda that helps the members understand the content and flow of the material to be presented. Once you have the overall PST outline, you will focus on preparing unit agendas and then combining them into the overall agenda that each member will receive in the PST notebook. The principles which follow apply to both preparing unit agendas and the detailed training agenda.

- **Experiential Learning:** Base each unit agenda and the overall agenda on the experiential learning model and include extensive active learning opportunities.
- **Complete Segments:** Remember that each training day and unit will need a beginning (introduction), a middle (knowledge, attitude, and/or skill development segments, usually experiential activities including experiencing, reporting, processing, generalizing, and application) and an end (sum-up, evaluation). Start each new unit with a brief introduction that presents learning objectives and links the unit to what has gone before, and end each unit with a sum-up that pulls concepts together, stresses their practical importance to the AmeriCorps experience, and leads into the next unit.
- **Content and Methods:** Specify major content to be covered, summarizing major points of information or skill areas; indicate the use of activities and briefly indicate the type of activity (e.g., case study, worksheet).
- **Training Roster:** List trainers and outside speakers with titles and affiliations; this is important both as a courtesy to them and so members can locate them in the future. (Also include in the member training notebooks the addresses and telephone numbers of trainers and presenters.)
- **Flow:** Vary the flow of training; for example, don't present each unit in the same order -- e.g., lecturette, exercise, summary. Vary the types of experiential learning. Use individual and small-group activities. Balance active segments with lecturettes and sometimes do the lecturette after an active learning experience.
- **Timing:** Provide adequate time for each segment of the training (each unit and activity), but keep the schedule somewhat "tight" so it is fast-paced and keeps members alert and involved.
- **Pacing:** Include surprises, lively activities, or light segments at times when member energy levels may be low, and start the day with an activity that strengthens the sense of common purpose and identity.
- **Activity Length:** Beware of activities lasting less than 30 minutes, except for icebreakers. Many short segments make the training "choppy," skills cannot be

taught that quickly, and getting the most out of an activity requires time for processing, generalizing, and applying what is learned during the experiencing phase. Even knowledge segments usually take at least 30 minutes.

- **Length of Lecturettes:** Limit lecturettes to about 20 minutes; you can increase this if you use group discussion and questions and actively involve the group. You can often go directly into an activity without a lecturette, and have the group generate the main points as a result of the experience.
- **Transitions:** Be sure to provide good transition between the various parts of a single unit and between units -- show how they interrelate and how one unit provides the foundation for the next. Look at the units before and after the one you are developing, so you can provide that transition.
- **Breaks:** Be sure to allow time for a mid-morning and a mid-afternoon break, plus adequate time for lunch.
- **Staying on Time:** Encourage and expect punctuality but build in a bit of excess time at the beginning of a unit, in case members arrive a bit late because of meal delays or other factors. Also, leave a little slack at the end of the session in case an unexpected point requires discussion.

ASSEMBLING A TRAINING UNIT

To prepare a training unit:

- **Follow an agreed-upon format for the member training notebook.** Include clear instructions for experiential activities. If you are using cooperative learning techniques, include instructions for each small group to select people to play required roles such as facilitator, recorder, and reporter. Samples of a format for Trainer's Notes and Member Instructions are found throughout the Training Topics & Activities section of this manual.
- **List the learning objectives for that unit** (see the suggestions on the following pages).
- **Determine the amount of time available for the unit,** and whether it is at all flexible. You might have a morning or afternoon, or perhaps the flexibility to add an evening segment. Relate your unit to the overall training outline if one has already been developed. Timing may already have been determined.

- **Decide how you will organize the unit**, to present required information, present and provide practice in developing skills, or attempt to change member attitudes. Usually, this will include a combination of:
 - ◆ **An introduction to the unit**, including its importance to AmeriCorps members and its relationship to units already covered.
 - ◆ **Presentation of the basic knowledge/information related to the unit**, through a lecturette, or through brainstorming or other small-group or individual work through which the information comes from the group and is confirmed and discussed with the help of the trainer.
 - ◆ **One or more experiential learning activities** to apply the knowledge, practice the skill, and explore the attitude. When teaching skills, it helps to provide several activities which are progressively more demanding. Outline how you will introduce the activity; have members carry out individual or group work; and have the trainer and members discuss or "process" the activity, see what lessons can be learned, and generalize from the activity to determine implications for the AmeriCorps experience.
 - ◆ **Further application of the knowledge, skills, and/or attitudes through some kind of community experience**, where feasible. You may be able to build in application of particular units in the overall community project. To do this, list the desired kinds of application or practice and be sure this information goes to the individual responsible for developing community activities for this PST.
 - ◆ **A summary or closing** which reinforces key concepts and applications of the material covered in the unit.
 - ◆ **Evaluation** of the unit.
- **Include each required activity**, along with Trainer's Notes and Member Instructions (see further suggestions on the following pages). Vary the types of activities within a unit or a single day, to fit different learning styles, and vary the content to interest members with different types of project assignments.
- **After putting the unit together, calculate the time required for each segment.** Use the same approach as the overall training agenda described above. Be sure you have allowed enough time for the introduction, initial presentation of information or skills, each experiential activity with plenty of time for "processing"

afterwards, and the closing. If you have been given a specified amount of time, be sure what you want to do can be properly handled in the time available.

- **Prepare or collect reference materials as member handouts.** Handouts should, at a minimum, summarize the key knowledge, skills, or attitudes being presented in this unit. Short handouts, formatted to emphasize steps, hints, or concept summaries are most likely to be used and read.
- **Prepare Trainer's Notes.** This may simply mean instructions for introducing each activity and major points to be covered in "processing" that activity. If a role play or use of a specific approach such as a particular cooperative learning technique is involved, more detailed instructions may be needed. You may want to specify room set-up, for example.
- **Include a unit evaluation.** This may be written or oral, and various techniques can be used (see *Chapter 4: Evaluating Pre-Service Training*, page 131).

LEARNING OBJECTIVES

Each training unit should have specific, measurable learning objectives indicating what knowledge, skills, or attitudes should result from this unit of PST. The objectives will guide the rest of the training design. The box below provides some examples:

EXAMPLES OF LEARNING OBJECTIVES

At the end of the PST, members will be able:

- To describe four typical leadership styles and how they differ from each other, as indicated in a post-session self-assessment.
- To design and conduct a community survey, as demonstrated by the actual design and implementation of a survey as part of the PST process.
- To accurately describe the major purposes and goals of AmeriCorps to people who are unfamiliar with the program, as demonstrated in a small-group presentation.

- Major desired PST outcomes should have been developed along with the overall training outline; review these before developing measurable learning objectives for specific units.

- Like other program objectives, learning objectives should *state a result in measurable terms with a time deadline* (usually "at the end of the training").
- A good format is *to* plus *an action verb* with an *object* and *modifiers* which specify criteria to be used in determining whether the objective has been met.
- State objectives in logical learning order; this usually means that they are in the chronological order of presentation.
- Use the objectives as the basis for developing the training unit agenda and activities.

ACTIVITIES

Remember that in learner-centered adult training, active learning is essential. Some hints:

- **For each activity, include Trainer's Notes and Member Instructions.** This means indicating whether the activity is to be done alone or in a group, if in a group how it should be formed, what kind of result is expected, time allocated for individual or group work, questions to be answered.
- **Include work materials such as case studies which are appropriate to your members and their assignments.**
- **Use a variety of experiential activities,** such as the following:
 - ◆ Individual member self-assessments.
 - ◆ Brainstorming in which small groups quickly identify issues, problems, or approaches.
 - ◆ Case studies which describe a situation, then pose a problem to be solved or questions to be answered.
 - ◆ Materials to be critiqued, with specific points to look for or questions to be answered.
 - ◆ Tasks with worksheets or a list of questions to be answered.
 - ◆ Skill practice sessions (individual, small group, or community-based).
 - ◆ Specific skill-building drills or short questions.
 - ◆ Role plays, sometimes using a "fish bowl" approach where other members observe the role play from various perspectives.
 - ◆ "What if" situations or scenarios for analysis and problem solving.
 - ◆ Peer teaching or training by individuals or groups of members.

- ◆ Community assignments -- observations, surveys, needs assessments, or projects.
- ◆ Portfolio activities, in which each member records or collects material to document learning and use later.
- **If you use activities from this manual or other existing sources, tailor them to fit your program.** Hints:
 - ◆ Develop role plays, case studies, and other materials which describe situations appropriate for your members -- they should involve program priority areas, projects, and types of organizations to which members will be assigned.
 - ◆ Use case studies or examples set in the communities where members will be working -- provide real descriptions of community services and problems, and include statistics from these communities. This will help members learn about the communities during the PST, and will make the training seem relevant, which is particularly important for adult learners.
 - ◆ Modify existing materials such as case studies or role plays to reflect as closely as possible the actual situations in which members will find themselves -- change an urban example to a rural one; use a school site rather than a community center if most members will be working in schools. If your member assignments are varied, have varied case studies as well. It can be useful to have each small group work on a different case study to illustrate different situations and applications of knowledge and skills; make each one illustrate a different type of member assignment.
 - ◆ Develop community experiences which will help prepare members for their own assignments, even if the PST is held far from their host site -- for example, if they will be renovating housing, have a community experience in which they do repairs on housing or a homeless shelter; if they will be working with preschool children, have a community experience at a preschool center.

Specific suggestions for refining particular case studies and other materials are provided in the various Training Topics & Activities chapters.

- **Link activities across units where appropriate.** Many suggestions for doing this are provided in the Training Topics & Activities chapters. For example, a

case study which is the basis for group problem solving can also be used to develop conflict resolution skills in a later unit. Community projects provide experiential learning related to such skills as community needs assessment, planning, and group problem solving. This approach provides continuity and shortens the time required for the second activity. Be sure the case study or community project is directly relevant to member assignments, so the content deserves this level of attention!

SUPPORTING MATERIALS

Supporting materials should cover the most important content within a unit and provide a basis for later reference for members -- or enable them to train others. Include them in the training notebook as reference material for use in developing lecturettes, prepared newsprint, and/or overheads. Hints:

- Emphasize practical information, such as steps for carrying out a community survey or hints for developing effective teambuilding.
- Provide models, worksheets, and formats which can be used by members in their project assignments.
- Include a few well-selected references to books, articles, or other resources, making sure that they are relevant, user-friendly, and available.

USING THE MANUAL IN PREPARING TRAINING UNITS

Each chapter in the Training Topics & Activities section of this manual includes detailed materials related to a specific training *topic*. Each topic area may cover a mix of knowledge, skills, and/or attitudes to be included in your training. The chapters are:

- Chapter 6: What Every Member Must Know, page 245
- Chapter 7: AmeriCorps Affiliation and Teambuilding, page 283
- Chapter 8: Leadership and Self-Understanding, page 311
- Chapter 9: Working Effectively in Groups, page 359
- Chapter 10: Organizational Culture and Norms, page 423
- Chapter 11: Diversity and Multiculturalism, page 445
- Chapter 12: Community-Related Skills, page 501
- Chapter 13: Planning and Evaluation, page 527
- Chapter 14: Community Projects, page 575

Each chapter provides background information and offers sample activities complete with Learning Objectives, Trainer's Notes, Member Instructions, and other handouts, as well as supporting materials on specific aspects of the training topics. For example:

Chapter 10: Organizational Culture and Norms, page 423, is designed to help members understand and be able to explain the concepts of organizational culture and norms, demonstrate the importance of such norms, and identify some major aspects of organizational culture and norms which they need to understand in order to work effectively in their host organization. It contains:

- Activity #19: *What Do You Do When...?*, page 427, which provides scenarios in which members can discuss what happens if they are unaware of organizational culture and norms, and identify ways to handle and to avoid potential problems related to ignorance of organizational norms.
- A supporting document called *Organizational Culture and Norms: Learning "The Rules"*, page 441, which can help guide the trainer responsible for this unit and serve as a handout for members. It identifies key aspects of organizational norms, and includes some key questions to be answered for members to work effectively within their host organizations.

The manual assumes that you will divide your pre-service training into training units. What materials you use and how you use them depends on your unique program and the parameters of your PST. In using the material in the Training Topics & Activities section, you may select units that coincide with the chapter topics in this manual, you may draw several units from a single chapter, or you may include a unit not covered in this manual but find some activities in the manual which are a useful part of that unit. For example:

- You might have a unit on Understanding and Appreciating Diversity and a separate unit on Developing Multicultural Competence, both drawn from Chapter 11, page 445.
- You might develop a single unit on Understanding Organizational Culture and Norms using the material in Chapter 10, page 423.
- You might want a unit on How to Conduct Home Visits, a topic which is not covered directly in this manual. However, you can use some of the activities related to diversity or community relationships from Chapter 11, page 445, or Chapter 12, page 501 or create your own.

Units may require a few hours in the training schedule, half a day, or longer, depending upon the number and duration of activities included. For example:

- A training unit on AmeriCorps administrative forms and requirements might include a brief lecturette followed by a group activity designed to familiarize members with the various forms, and appropriate follow-up discussion. This might take one or two hours.
- A training unit on diversity might include three or four activities focusing on different aspects of the topic, such as understanding American diversity, identifying dimensions of diversity, and working with diverse member groups. This might take half a day or more.

OTHER MATERIALS

In addition to the materials for members, your PST training package will also include evaluation methods and materials (see *Chapter 4: Evaluating PST*, page 131) and Trainer Notes (see each of the Training Topics & Activities chapters and *Chapter 3: Preparing Trainers* in this section, page 107).

Chart D: Training Unit Summary

Desired Outcome or Learning Objective	Training Approach or Activity	Time Required and Schedule (Date/Time)	Handouts, Equipment, Resources, Trainer Skills Needed	Evaluation Strategy

